

**Amended First and Final Accounting and Report of Status of Administration and  
Petition for Final Distribution**

<b>DOD: 8/5/2001</b>	<b>VICTOR W. SIDERS</b> , Administrator with Will Annexed, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Need Second Amended First and Final Account based on, but not limited to, the following:</b>  <ol style="list-style-type: none"><li>1. Accounting does not comply with Probate Code §1060 et seq.</li><li>2. The pages of the pleadings after the first page are upside down.</li><li>3. Petition was not signed or verified by the fiduciary.</li><li>4. Inventory and appraisal was not signed by the probate referee and does not include any property. Attached to the inventory and appraisal is a summary of account that does not comply with Probate Code §1060.</li><li>5. It appears that the fiduciary transferred the real property into his name and refinanced. Need authority which would allow distribution prior to a court order.</li><li>6. The court will require more information about the refinance and distribution of the real property.</li><li>7. Petition states the fiduciary was paid compensation totaling \$16,266.44. Compensation cannot be paid prior to an order allowing compensation.</li><li>8. Need Notice of Hearing.</li><li>9. Need proof of service of the Notice of Hearing on Brian L. Fox pursuant to his Request for Special Notice filed on 3/10/03.</li></ol>
	Account period: 3/21/03 – 12/8/13	
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		<b>Reviewed by: KT</b>
<b>Status Rpt</b>		<b>Reviewed on: 8/13/14</b>
<b>UCCJEA</b>		<b>Updates:</b>
<b>Citation</b>		<b>Recommendation:</b>
<b>FTB Notice</b>		<b>File 1 – Siders</b>

**Notice of Status Hearing Re: Failure to File a First Account or Petition for Final Distribution**

<b>DOD: 11/25/07</b>	<p><b>MARGIE GFELLER</b>, Spouse, was appointed as Executor without IAEA authority and without bond on 03/18/08. Letters were issued on 05/13/08.</p> <p><b>Petition for Authority to Administer Estate without Court Supervision</b> filed 06/02/08. <b>Order Granting Authority To Administer Estate Without Court Supervision</b> was filed 07/10/08. <b>Letters Testamentary with Full IAEA Authority</b> were issued on 07/14/08.</p> <p>Inventory &amp; Appraisal, partial no. 1 - \$210,000.00</p> <p>Inventory &amp; Appraisal, partial no. 2 - \$835,000.00</p> <p><b>Notice of Status Hearing</b> filed 10/31/13 set this matter for status regarding failure to file a First Account and/or Petition for Final Distribution. <b>Clerk's Certificate of Mailing</b> states that the Notice of Status Hearing was mailed to Joanne Sanoian on 10/31/13.</p> <p><b>Status Hearing Report</b> filed 01/02/14 states: it is anticipated that the First and Final Account and Report and Petition for Distribution will be filed within 60 days.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>CONTINUED FROM 07/31/14</u></b> <b>Minute Order from 07/31/14 states:</b> <b>The Court orders the executor to be present at the next hearing.</b></p> <p><b>Clerk's Certificate of Mailing filed 07/31/14</b> states a copy of the minute order from 07/31/14 was mailed to Margie Gfeller on 07/31/14.</p> <p><b>As of 08/13/14, nothing further has been filed in this matter:</b></p> <ol style="list-style-type: none"> <li>1. Need Final Inventory &amp; Appraisal.</li> <li>2. Need Accounting/Report of Administrator and Petition for Final Distribution.</li> </ol>
<b>Cont. from 010314, 030714, 050214, 073114</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 08/13/14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 2 – Gfeller</b></p>		

## (1) First and Final Report of Executor on Waiver of Account and for (2) Final Distribution

<b>DOD: 3-8-06</b>	<b>ARACELI SOTO GOMEZ</b> Executor with full IAEA without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Continued from 12-10-13, 1-28-14, 3-2-14, 5-5-14, 6-19-14
	Accounting is waived.	Minute orders reflect continuance, but no other information is noted.
<b>Cont. from 121013, 012814, 030214, 050514, 061914</b>	I&A: \$68,035.00 POH: \$68,035.00 (Decedent's one-third interest in real property plus personal property)	The following issue remains:
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Executor (Statutory): Waived	1. According to Attorney Cross' status report filed 12-12-12, it was learned that there was a title issue stemming from Decedent's divorce in 1983 wherein the Decedent was awarded the residence, but the judgment did not contain the complete legal description of the property, so the assessor had no record of transfer to her alone. Attorney Cross anticipated filing an application to the Family Court in the old dissolution case 0274152-8 to modify the judgment or sign a deed conveying the property.
<input checked="" type="checkbox"/> <b>Verified</b>	Attorney (Statutory): Waived	In this petition, Petitioner states the correction is expected to be completed before the hearing (on 10-10-13); however, Court records do not reflect any activity in that case (0274152-8).
<input checked="" type="checkbox"/> <b>Inventory</b>	Costs: \$1,090.00 (to be paid by Executor outside of probate estate)	Was the title issue corrected? Is the estate in a position to close? Need clarification.
<input checked="" type="checkbox"/> <b>PTC</b>	<b>Distribution pursuant to Decedent's will:</b>	Status Report filed 6-18-14 states an ex parte application has been submitted to the Family Court. Mr. Cross requests continuance to August 2014 to allow the Family Court to complete the action requested.
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	Araceli Soto Gomez: \$67,285 (Decedent's one-third interest in real property plus personal property)	As of 8-13-14, nothing further has been filed.
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		<b>Reviewed by:</b> skc
<input type="checkbox"/> <b>Status Rpt</b>		<b>Reviewed on:</b> 8-13-14
<input type="checkbox"/> <b>UCCJEA</b>		<b>Updates:</b>
<input type="checkbox"/> <b>Citation</b>		<b>Recommendation:</b>
<input checked="" type="checkbox"/> <b>FTB Notice</b>		<b>File</b> 3 – Soto

**Third Amended First and Final Account and Report of Conservator; Petition for Its Settlement; for Attorney Fees; and Discharge or Conservator of the Estate**

<b>DOD: 04/17/13</b>		<b>KATINA SAPIEN LOZANO PAULEY,</b> Conservator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 6/12/14. As of 7/16/14 the following issues remain:</b>  1. Schedule E – Property on Hand indicates that there was a balance of \$7,731.72 in the client trust account as of the end of the accounting period. Declaration of Clerical Error filed 05/28/14 states that the amount in the client trust account is \$1,452.00. It is unclear if the \$1,452.00 is part of the \$7,731.72 or if \$1,452.00 is all that remains in the trust account. Need clarification and amended may be needed. The Petition (and Order) seek authorization to withdraw funds from various conservatorship accounts to pay the requested attorney fees, however it appears that there are sufficient funds already in the trust account to pay the fees if the balance is \$7,731.72 as stated in the accounting. After payment of the requested \$7,295.00 in attorney's fees (if approved), there should be a balance of \$436.72 to be refunded to the conservatorship estate. Need revised Order.
		Account period: <b>09/19/11 – 12/16/13</b>	
<b>Cont. from 052914, 061214, 071714</b>		Accounting - <b>\$102,960.95</b> Beginning POH - <b>\$37,268.63</b> Ending POH - <b>\$17,668.83</b> (\$15,668.83 is cash)	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	Conservator - <b>waived</b>	
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>	Attorney - <b>\$7,295.00</b> (per declaration, itemized by date for 2.4 hours @ \$300/hr., 17.3 hours @ \$200/hr. and 31.15 hours @ \$100/hr.)	
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Petitioner states that \$10,796.83 was paid to the Joanne Sanoian client trust account on 06/04/12. The Court subsequently reduced the approved attorney fee to \$8,874.83 leaving a balance in the trust account of \$1,452.00.	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	Petitioner requests that the remaining property on hand be distributed to her as the successor trustee of the Angelina S. Lozano Living Trust pursuant to Probate Code § 13100 (Declaration attached to Petition as exhibit B).	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>2620(c)</b>	Bond, currently posted in the amount of \$60,000.00 is sufficient.	
<input checked="" type="checkbox"/>	<b>Order</b>	<b>Petitioner prays for an Order:</b> 1. Authorizing the attorney's fees; 2. Authorizing Petitioner to close the blocked account ending in 5483 and deposit into the conservatorship checking account ending in 6758. 3. Authorizing and directing Petitioner to distribute the remaining assets in the Joanne Sanoian Client Trust Account into the conservatorship's checking accounting ending in 6758. 4. Authorizing the distribution of the remaining assets of the conservatorship estate to Katina Sapien Lozano Pauley as successor trustee of the Angelina S. Lozano Living Trust. 5. Discharging Petitioner's bond and upon filing of the proper receipts, and filing of an Ex Parte Order for Final Discharge, discharging Petitioner.	
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> JF
			<b>Reviewed on:</b> 08/13/14
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 4 - Lozano</b>

## (1) Petition for Settlement of First and Final Account and (2) Final Distribution and (3) for Order Fixing and Allowing Compensation for All Services Rendered

<b>DOD: 10/07/12</b>		<b>WALTER LORENZ</b> , Administrator, is Petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		Account period: <b>03/29/13 – 05/30/13</b>		1. An itemization of the requested administrator reimbursement has been provided, however no itemization of the requested \$677.43 in costs has been provided. Need itemization of the \$677.43 of costs requested.  2. Notice to the Franchise Tax Board was provided on 06/25/14. Due to the late notice, the court may wish to continue the matter for 90 days to allow time for the Franchise Tax Board to file a claim.  3. Need Order.	
<b>Cont. from 062614</b>		Accounting - <b>\$85,000.00</b>			
<b>Aff.Sub.Wit.</b>		Beginning POH - <b>\$85,000.00</b>			
<input checked="" type="checkbox"/> <b>Verified</b>		Ending POH - <b>\$74,154.88</b> (all cash)			
<input checked="" type="checkbox"/> <b>Inventory</b>		Administrator - <b>\$3,400.00</b> (statutory)			
<input checked="" type="checkbox"/> <b>PTC</b>		Administrator reimbursement - <b>\$20,958.00</b> (for expenses incurred in maintaining and selling the real property asset of the estate, itemization provided))			
<input checked="" type="checkbox"/> <b>Not.Cred.</b>		Attorney - <b>\$3,400.00</b> (statutory)			
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		Costs - <b>\$677.43</b> (no itemization provided)			
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/o		Closing - <b>\$750.00</b>			
<b>Aff.Pub.</b>		<b>Distribution, pursuant to intestate succession, is to:</b>			
<b>Sp.Ntc.</b>		Dave Predergast - \$11,242.36			
<b>Pers.Serv.</b>		Bonnie Prendergast - \$11,242.36			
<b>Conf. Screen</b>		Andrew Prendergast - \$11,242.36			
<b>Letters</b> 03/29/13		Timothy Prendergast - \$11,242.36			
<b>Duties/Supp</b>					
<b>Objections</b>					
<b>Video Receipt</b>					
<b>CI Report</b>					
<input checked="" type="checkbox"/> <b>9202</b>					
<b>Order</b> x					
<b>Aff. Posting</b>					
<b>Status Rpt</b>					
<b>UCCJEA</b>					
<b>Citation</b>					
<input checked="" type="checkbox"/> <b>FTB Notice</b>					

<b>Reviewed by:</b> JF
<b>Reviewed on:</b> 08/13/14
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 5 - Lorenz</b>

## Petition for Probate of Will and for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

<b>DOD: 4/17/13</b>		<b>PUBLIC ADMINISTRATOR</b> is petitioner and requests appointment as Administrator with Will Annexed.  Full IAEA - o.k.  Will dated: 7/12/2004  Residence: North Carolina (leaving personal property and purported life insurance proceeds held by decedent's brother, in Clovis CA.)  Publication: Fresno Business Journal  <u><b>Estimated value of the Estate:</b></u> Personal Property- \$250,000.00 Real property - \$150,000.00 <b>Total - \$400,000.00</b>  <b>Probate Referee: Steven Diebert</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>OFF CALENDAR.</b></u> Dismissal entered on 8/13/14	
Cont. from 031214, 042814, 063014				
<input type="checkbox"/>	Aff.Sub.Wit.			S/P
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			N/A
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: KT Reviewed on: 8/13/14 Updates: Recommendation: File 6 – Higgins	

Atty Lyon, Paul J., sole practitioner (for Petitioners George M. Smith and Michelle J. Smith)

## Second Amended Petition for Appointment of Probate Conservator of the Person

<b>Age: 26 years</b>		<b>NO TEMPORARY REQUESTED</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>		
		<p><b>GEORGE M. SMITH and MICHELLE J. SMITH</b>, parents, are Petitioners and request appointment as Conservator of the Person with medical consent powers.</p> <p><b>Need Capacity Declaration</b></p> <p><b>Voting Rights NOT Affected</b></p> <p><b>Petitioners state</b> the proposed Conservatee has Down syndrome and is developmentally disabled with a low IQ, and is unable to provide necessities of food or shelter for herself.</p> <p><b>Court Investigator Jennifer Daniel's Report</b> was filed on 7/10/2014.</p>		<p><b>Page 8</b> is the related case of this proposed Conservatee's sibling.</p> <p><b>Court Investigator Advised Rights on 6/12/2014.</b></p> <p>1. <i>Petition</i> requests medical consent powers. Need <i>Medical Capacity Declaration</i> (Judicial Council form GC-335) in support of Petitioners' request pursuant to Probate Code § 1890(c).</p> <p><b>~Please see additional page~</b></p>		
<b>Cont. from</b>						
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>					
✓	<b>Verified</b>					
<input type="checkbox"/>	<b>Inventory</b>					
<input type="checkbox"/>	<b>Cap. Dec.</b>					X
<input type="checkbox"/>	<b>Not.Cred.</b>					
✓	<b>Notice of Hrg</b>					
✓	<b>Aff.Mail</b>					W/
<input type="checkbox"/>	<b>Aff.Pub.</b>					
<input type="checkbox"/>	<b>Sp.Ntc.</b>					
✓	<b>Pers.Serv.</b>					
✓	<b>Conf. Screen</b>					
✓	<b>Letters</b>					
✓	<b>Duties/Supp</b>					
<input type="checkbox"/>	<b>Objections</b>					
✓	<b>Video Receipt</b>					
✓	<b>CI Report</b>					
<input type="checkbox"/>	<b>9202</b>					
✓	<b>Order</b>					
<input type="checkbox"/>	<b>Aff. Posting</b>					
<input type="checkbox"/>	<b>Status Rpt</b>					
<input type="checkbox"/>	<b>UCCJEA</b>					
✓	<b>Citation</b>					
<input type="checkbox"/>	<b>FTB Notice</b>					
				<b>Reviewed by:</b> LEG		
				<b>Reviewed on:</b> 8/13/14		
				<b>Updates:</b>		
				<b>Recommendation:</b>		
				<b>File 7 – M. Smith</b>		

**NEEDS/PROBLEMS/COMMENTS, continued:**

2. *Citation for Conservatorship* filed 6/9/2014 lists in Item 1(a) the hearing date of 6/26/2014, which was the date for the *First Amended Petition*, and therefore the proposed Conservatee was not personally served for the instant hearing date of 8/14/2014. Court may require service of a new *Citation* on the proposed Conservatee with a copy of the *Second Amended Petition for Appointment of Probate Conservator* pursuant to Probate Code § 1824. (Note: If proposed Conservatee is present at hearing, this issue will become moot.)

**Note:** Attachment 1(f) to the *Petition* sets forth powers and duties of the proposed Conservators that appear to be requested by Petitioners, some of which are powers and duties of general conservators as a matter of course. However, the following powers and duties listed (set forth below in sum), are **not** authorized as a matter of course, and the proposed orders and letters have been marked by the Examiner to authorize only those typical powers and duties of a general conservator:

- Consent to medical treatment (unless Petitioners file a satisfactorily completed *Capacity Declaration* in support of medical consent powers);
- Placement of the Conservatee in a secured perimeter residential care facility (which is impermissible in this case.)



Atty Lyon, Paul J., sole practitioner (for Petitioners George M. Smith and Michelle J. Smith)

## Second Amended Petition for Appointment of Probate Conservator of the Person

<b>Age: 23 years</b>		<b>NO TEMPORARY REQUESTED</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>		
		<p><b>GEORGE M. SMITH and MICHELLE J. SMITH</b>, parents, are Petitioners and request appointment as Conservator of the Person with medical consent powers.</p> <p><b>Need Capacity Declaration</b></p> <p><b>Voting Rights NOT Affected</b></p> <p><b>Petitioners state</b> the proposed Conservatee has Down syndrome and is developmentally disabled with a low IQ, and is unable to provide necessities of food or shelter for himself.</p> <p><b>Court Investigator Jennifer Daniel's Report</b> was filed on 7/10/2014.</p>		<p><b>Page 7</b> is the related case of this proposed Conservatee's sibling.</p> <p><b>Court Investigator Advised Rights on 6/12/2014.</b></p> <p>3. <i>Petition</i> requests medical consent powers. Need <i>Medical Capacity Declaration</i> (Judicial Council form GC-335) in support of Petitioners' request pursuant to Probate Code § 1890(c).</p> <p><b>~Please see additional page~</b></p>		
<b>Cont. from</b>						
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>					
✓	<b>Verified</b>					
<input type="checkbox"/>	<b>Inventory</b>					
<input type="checkbox"/>	<b>Cap. Dec.</b>					X
<input type="checkbox"/>	<b>Not.Cred.</b>					
✓	<b>Notice of Hrg</b>					
✓	<b>Aff.Mail</b>					W/
<input type="checkbox"/>	<b>Aff.Pub.</b>					
<input type="checkbox"/>	<b>Sp.Ntc.</b>					
✓	<b>Pers.Serv.</b>					
✓	<b>Conf. Screen</b>					
✓	<b>Letters</b>					
✓	<b>Duties/Supp</b>					
<input type="checkbox"/>	<b>Objections</b>					
✓	<b>Video Receipt</b>					
✓	<b>CI Report</b>					
<input type="checkbox"/>	<b>9202</b>					
✓	<b>Order</b>					
<input type="checkbox"/>	<b>Aff. Posting</b>					
<input type="checkbox"/>	<b>Status Rpt</b>					
<input type="checkbox"/>	<b>UCCJEA</b>					
✓	<b>Citation</b>					
<input type="checkbox"/>	<b>FTB Notice</b>					
				<b>Reviewed by:</b> LEG		
				<b>Reviewed on:</b> 8/13/14		
				<b>Updates:</b>		
				<b>Recommendation:</b>		
				<b>File 8 – E. Smith</b>		

**NEEDS/PROBLEMS/COMMENTS, continued:**

4. *Citation for Conservatorship* filed 6/9/2014 lists in Item 1(a) the hearing date of 6/26/2014, which was the date for the *First Amended Petition*, and therefore the proposed Conservatee was not personally served for the instant hearing date of 8/14/2014. Court may require service of a new *Citation* on the proposed Conservatee with a copy of the *Second Amended Petition for Appointment of Probate Conservator* pursuant to Probate Code § 1824. (Note: If proposed Conservatee is present at hearing, this issue will become moot.)

**Note:** Attachment 1(f) to the *Petition* sets forth powers and duties of the proposed Conservators that appear to be requested by Petitioners, some of which are powers and duties of general conservators as a matter of course. However, the following powers and duties listed (set forth below in sum), are **not** authorized as a matter of course, and the proposed orders and letters have been marked by the Examiner to authorize only those typical powers and duties of a general conservator:

- Consent to medical treatment (unless Petitioners file a satisfactorily completed *Capacity Declaration* in support of medical consent powers);
- Placement of the Conservatee in a secured perimeter residential care facility (which is impermissible in this case.)

<b>DOD: 10/20/1999</b>	<b>ROBERT BRUCE STEVER</b> , son is petitioner and requests appointment as Administrator without bond.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note: If the petition is granted status hearings will be set as follows:</b>  <ul style="list-style-type: none"> <li>• <b>Thursday, 01/15/2015 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u></li> <li>• <b>Thursday, 10/15/2015 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
	All heirs waive bond.	
	Full IAEA – o.k.	
<b>Cont. from</b>	Decedent died intestate	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Residence: Sanger	
<input checked="" type="checkbox"/> <b>Verified</b>	Publication: Sanger Herald	
<input type="checkbox"/> <b>Inventory</b>	<b>Estimated Value of the Estate:</b>	
<input type="checkbox"/> <b>PTC</b>	<b>Real property - \$234,000.00</b>	
<input type="checkbox"/> <b>Not.Cred.</b>	Probate Referee: Rick Smith	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	w/	
<input checked="" type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 08/12/2014
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 9 – Stever</b>

**Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

<b>DOD: 03/04/2014</b>		<b>ROBERT BRUCE STEVER</b> , son is petitioner and requests appointment as Administrator, without bond.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		All heirs waive bond.	<p><b>Note:</b> If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li>• <b>Thursday, 01/15/2015 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u></li> <li>• <b>Thursday, 10/15/2015 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
<b>Cont. from</b>		Full IAEA – o.k.	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Decedent died intestate	
<input checked="" type="checkbox"/>	<b>Verified</b>	Residence: Sanger	
<input type="checkbox"/>	<b>Inventory</b>	Publication: Sanger Herald	
<input type="checkbox"/>	<b>PTC</b>	<b>Estimated value of the Estate:</b>	
<input type="checkbox"/>	<b>Not.Cred.</b>	Personal property - \$104,300.00	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Real property - \$467,000.00	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	<b>Total - \$571,300.00</b>	
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>	Probate Referee: Rick Smith	
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> LV
			<b>Reviewed on:</b> 08/13/2014
			<b>Updates:</b>
			<b>Recommendation:</b> Submitted
			<b>File 10 – Stever</b>

**Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

<b>DOD: 6/13/2014</b>			<p><b>TIMOTHY D. BARTELL</b>, named alternate executor without bond, is petitioner.</p> <p>Named executor declines to act.</p> <p>Full IAEA - o.k.</p> <p>Will dated: 6/13/2008</p> <p>Residence: Fresno Publication: Fresno Business Journal</p> <p><u><b>Estimated value of the estate:</b></u></p> <table> <tr> <td>Personal property</td> <td>-</td> <td>\$ 30,000.00</td> </tr> <tr> <td>Real property</td> <td>-</td> <td>\$240,000.00</td> </tr> <tr> <td><b>Total</b></td> <td>-</td> <td><b>\$270,000.00</b></td> </tr> </table> <p><b>Probate Referee: Rick Smith</b></p>	Personal property	-	\$ 30,000.00	Real property	-	\$240,000.00	<b>Total</b>	-	<b>\$270,000.00</b>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u><b>Note:</b></u> If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li><b>Wednesday, January 14, 2015</b> at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.</li> <li><b>Wednesday, October 14, 2015</b> at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
Personal property	-	\$ 30,000.00											
Real property	-	\$240,000.00											
<b>Total</b>	-	<b>\$270,000.00</b>											
<b>Cont. from</b>													
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>												
<input checked="" type="checkbox"/>	<b>Verified</b>												
<input type="checkbox"/>	<b>Inventory</b>												
<input type="checkbox"/>	<b>PTC</b>												
<input type="checkbox"/>	<b>Not.Cred.</b>												
<input type="checkbox"/>	<b>Notice of Hrg</b>												
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/											
<input type="checkbox"/>	<b>Aff.Pub.</b>												
<input type="checkbox"/>	<b>Sp.Ntc.</b>												
<input type="checkbox"/>	<b>Pers.Serv.</b>												
<input type="checkbox"/>	<b>Conf. Screen</b>												
<input checked="" type="checkbox"/>	<b>Letters</b>												
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>												
<input type="checkbox"/>	<b>Objections</b>												
<input type="checkbox"/>	<b>Video Receipt</b>												
<input type="checkbox"/>	<b>CI Report</b>												
<input type="checkbox"/>	<b>9202</b>												
<input checked="" type="checkbox"/>	<b>Order</b>												
<input type="checkbox"/>	<b>Aff. Posting</b>												
<input type="checkbox"/>	<b>Status Rpt</b>												
<input type="checkbox"/>	<b>UCCJEA</b>												
<input type="checkbox"/>	<b>Citation</b>												
<input type="checkbox"/>	<b>FTB Notice</b>												
			<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 8/13/14</b></p> <p><b>Updates:</b></p> <p><b>Recommendation: SUBMITTED</b></p> <p><b>File 11 – Bartell</b></p>										

**Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

<b>DOD: 5/8/14</b>		<b>JAMIE A. TAYLOR</b> , named executor without bond, is petitioner.  Full IAEA - o.k.  Will dated: 1/13/11  Residence: Fresno Publication: Fresno Business Journal  <u><b>Estimated value of the estate:</b></u> Real property                -                \$280,000.00  <b>Probate Referee: Rick Smith</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>Note:</b></u> If the petition is granted, status hearings will be set as follows:  <ul style="list-style-type: none"> <li><b>Wednesday, January 14, 2015</b> at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.</li> <li><b>Wednesday, October 14, 2015</b> at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.</li> </ul> Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
<b>Cont. from</b>			
✓	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b> W/O		
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
✓	<b>Letters</b>		
✓	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
		<b>Reviewed by: KT</b> <b>Reviewed on: 8/13/14</b> <b>Updates:</b> <b>Recommendation: SUBMITTED</b> <b>File 12 – Taylor</b>	

**Probate Status Hearing for Failure to File the Inventory and Appraisal and for  
Failure to File a First Account or Petition for Final Distribution**

<b>DOD: 01/12/01</b>	<b>SUSAN HOSE</b> , wife, was appointed Administrator without bond on 07/03/01. Letters of Administration were issued on 07/03/01.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>Continued from 06/19/14</u></b>  <b><u>Note:</u></b> Nothing was filed in this matter after the Letters of Administration were issued, including an Inventory & Appraisal, therefore it is unclear if there ever were assets subject to administration.  1. Need Inventory & Appraisal and Account/Report of Administrator on waive of Account and Petition for Final Distribution <u>or</u> Verified Petition to terminate the probate administration (see Probate Code § 12251).					
<b>Cont. from 092013, 110113, 013214, 022114, 041114, 050914, 061914</b>	<b>Notice of Status Hearing</b> filed 07/31/13 set this matter for status on 09/20/13.						
<b>Aff.Sub.Wit.</b>	<b>Declaration of Randolph Krbechek Regarding the Status of the Action and Request for Dismissal</b> filed 08/29/13 states: Mr. Krbechek and the decedent worked together and were good friends. After his untimely death, Mr. Krbechek assisted Susan Hose, the decedent's wife, with probate matters. He does not recall why a probate proceeding was started, assumably because an insurance company or similar entity demanded that Letters of Administration were obtained. Susan moved to Florida some time ago and while he had been in contact with her for some time after the decedent's death, he has not had contact with her for the past 3 years and does not have a current address. Mr. Krbechek states that he is certain that any matters requiring attention in connection with the decedent's death have long since been completed and there is no reason to keep this matter open. Mr. Krbechek requests that this probate administration be concluded.	<table border="1"> <tr><td><b>Reviewed by:</b> JF</td></tr> <tr><td><b>Reviewed on:</b> 08/13/14</td></tr> <tr><td><b>Updates:</b></td></tr> <tr><td><b>Recommendation:</b></td></tr> <tr><td><b>File 13 – Hose</b></td></tr> </table>	<b>Reviewed by:</b> JF	<b>Reviewed on:</b> 08/13/14	<b>Updates:</b>	<b>Recommendation:</b>	<b>File 13 – Hose</b>
<b>Reviewed by:</b> JF							
<b>Reviewed on:</b> 08/13/14							
<b>Updates:</b>							
<b>Recommendation:</b>							
<b>File 13 – Hose</b>							
<b>Verified</b>							
<b>Inventory</b>							
<b>PTC</b>							
<b>Not.Cred.</b>							
<b>Notice of Hrg</b>							
<b>Aff.Mail</b>							
<b>Aff.Pub.</b>							
<b>Sp.Ntc.</b>							
<b>Pers.Serv.</b>							
<b>Conf. Screen</b>							
<b>Letters</b>							
<b>Duties/Supp</b>							
<b>Objections</b>							
<b>Video Receipt</b>							
<b>CI Report</b>							
<b>9202</b>							
<b>Order</b>							
<b>Aff. Posting</b>							
<b>Status Rpt</b>							
<b>UCCJEA</b>							
<b>Citation</b>							
<b>FTB Notice</b>							

**Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for  
Failure to File a First Account or Petition for Final Distribution**

		<b>WILLIAM R. SHOCKLEY</b> and <b>KATHERINE ROYCE</b> , children, were appointed Co-Administrators with full IAEA without bond on 12/12/2006.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Minute Order of 06/30/2014:</b> Examiner notes provided to counsel.  <b>Minute Order of 05/16/2014:</b> The Court will allow the filing of the document with a Fee Waiver.  <b>Minute Order of 03/07/2014 (Judge Hamlin):</b> No appearances. Counsel to file the required documents or a status report before the next hearing. Failure to file said documents will result in the issuance of an order to show cause regarding contempt. Robert Cross ordered to be personally present on 05/16/2014.  <b>Copy of Minute Order was mailed to Attorney Robert W. Cross on 03/19/2014.</b>  1. Need Inventory and Appraisal and First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
		Letters issued on 12/14/2006.	
<b>Cont. from 030714, 051614, 063014</b>		Inventory and Appraisal was due on 05/2007.	
<b>Aff.Sub.Wit.</b>		First Account or Petition for Final Distribution was due 02/2008.	
<b>Verified</b>		Notice of Status Hearing was mailed to Robert W M Cross on 12/18/2013.	
<b>Inventory</b>		<b>Former Status Report filed 05/14/2014</b> states that co-administrator or decedent's estate, Katherine Royce, died on 08/05/2011. Mr. Shockley, co-administrator, has promised to prove a copy of her death certificate. In this case, the sole significant asset was the residence real property commonly known as 2805 B Street, Ca. which was subject to a substantial note secured by the deed of trust on the property. At the time of appointment of the personal representatives it appeared that there was substantial equity in the home. It was listed for sale and a buyer was found for a reasonable price. Unfortunately the buy backed out at the last minute. The value of the property then dropped because of the sharp decline of property values in general, no buyer was found at lower prices, and the property ultimately became worthless than the amount owed on notes secured by a deed of trust. Co-administrator William R. Shockley made the house payments for about a year, but beyond that it was beyond his means, and his co-administrator sister lacked means to contribute significantly to continue payment on the real property. As a consequence the property was ultimately washed in foreclosure. The lender refused to deal with the co-administrators with regard to the property. As a consequence of the above, the remaining administrator, William R. Shockley, has no assets to pay to any of the numerous creditors of decedent. Attorney Cross is requesting that remaining co-administrator supply the attorney with the documentation concerning the foreclosure and his payments. Nothing remains, of course, to reimburse him either.	
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			<b>Reviewed by:</b> LV /
<b>Status Rpt</b>			<b>Reviewed on:</b> 08/12/2014
<b>UCCJEA</b>		<b>Updates:</b> (skc 06/27/2014)	
<b>Citation</b>		<b>Recommendation:</b>	
<b>FTB Notice</b>		<b>File 14 – Shockley</b>	



**Page 2**

**Former Status report filed 6-26-14 by Attorney Cross (not verified) states** he has finally had the opportunity to speak with Mr. Shockley. He stated that his sister (now deceased Co-Administrator) had taken charge of most of the estate since she lived in Selma, and he lives in Oakhurst. Together, they paid about a year of payments on the home and funeral expenses, etc. When the sale of the house fell through, she informed him that she was not going to pay any ore toward the house, so he didn't either. She then cut off contact with him for over three years. She did not supply him with any copies.

Mr. Cross states neither co-administrator sought his advice during that time regarding the sale of the property.

At the hearing on 5-16-14, Judge Oliver ordered a waiver of filing fees based upon the insolvency of the estate and suggested that we could proceed by way of declaration based on information and belief, as had apparently been suggested in other cases. It appears this would take the form of a Petition for Termination of Further Proceedings and Discharge of Personal Representative.

The Surviving Co-Administrator and the attorney would like to proceed in this fashion. However, because the attorney finds paucity of authority as to what would be required, he is requesting guidance from the court and/or Probate Examiners. Is Inventory and Appraisal required? Is an accounting needed? Is notice of hearing required to creditors or any other person or entity? Upon having a better understanding of what is required, the petition will be filed within 30 days.

**Examiner's Notes re above questions:**

**Q: Is Inventory and Appraisal required?**

A: Pursuant to Probate Code §8800, inventory and appraisal is required. In this case, there was an estate asset that ultimately foreclosed. If you would like to request that the Court waive the requirement of the Inventory and Appraisal due to the circumstances of this estate, you may wish to include such request in your petition. You may need to provide notice to the Probate Referee. See Probate Code §8900 et seq.

**Q: Is notice of hearing required to creditors or any other person or entity?**

A: A petition to terminate proceedings requires notice to all persons entitled thereto, which may include relatives, creditors whose claims were allowed but not paid per Probate Code §11000, and those who have requested special notice pursuant to Probate Code §1252. In this case, the California Franchise Tax Board requested special notice. You may also wish to address whether notice to the agencies in Probate Code §9202 is or was required and given. You will also be required to address the creditor's claims individually, in addition to notice of hearing. See Judicial Council Allowance or Rejection of Creditor's Claim and Probate Code §9250.

**Q: Is an accounting needed?**

A: Please see applicable Probate Code, including §§ 10951, 11000, 12200. Account may be requested by a creditor pursuant to the notice, or may be compelled by the Court, depending on circumstances.

**In short, the estate must be properly closed, and how you wish to go about that is up to you as the attorney; however, the above information is provided as a general guideline with reference to Probate Code.**

**Probate Status Hearing Re: (1) Failure to File Inventory and Appraisal; (2) Filing of First Account or Petition for Final Distribution**

<b>DOD: 9-22-11</b>	<b>KATHLEEN M. NORKUNAS,</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Surviving Spouse, was	<u>Continued from 11-15-14, 1-30-14, 5-1-14,</u>
	appointed Executor with Full	<u>6-19-14</u>
	IAEA without bond and	<b>Update:</b> On 5-9-14, an Inventory and Appraisal was
	Letters issued on 9-4-12.	filed indicating that the value of the estate at \$0.
<b>Cont. from 111513,</b>	No Inventory and Appraisal	Attached is a letter from Attorney Weinberg
<b>013014, 050114,</b>	has been filed; however, the	requesting that Ms. Norkunas be discharged.
<b>061914</b>	original petition for probate	
<b>Aff.Sub.Wit.</b>	estimated that the estate	1. <b>Need first account or petition for final</b>
<b>Verified</b>	contained personal property	<b>distribution, or to terminate administration, or</b>
<b>Inventory</b>	valued at \$450,000.00,	<b><u>verified</u> status report pursuant to probate code</b>
<b>PTC</b>	income of \$20,000.00, and	<b>and local rules.</b>
<b>Not.Cred.</b>	real property valued at	
<b>Notice of Hrg</b>	\$250,000.00.	<b>Note:</b> Per the decedent's will, Ms. Norkunas is
<b>Aff.Mail</b>	On 8-15-13, the Court set this	the sole heir; however, Letters have issued and
<b>Aff.Pub.</b>	status hearing for failure to file	the estate must be properly closed with
<b>Sp.Ntc.</b>	Inventory and Appraisal and	appropriate notice pursuant to applicable law.
<b>Pers.Serv.</b>	failure to file a first account or	
<b>Conf. Screen</b>	petition for final distribution.	<b>Note:</b> An Ex Parte Petition for Discharge was
<b>Letters</b>	Notice was mailed to	submitted; however, discharge is not
<b>Duties/Supp</b>	Attorney Weinberg on	appropriate at this time without a final petition
<b>Objections</b>	8-15-13.	and order for distribution, or other <u>verified</u>
<b>Video Receipt</b>		petition to close the estate.
<b>CI Report</b>		
<b>9202</b>		<b>Reviewed by:</b> skc
<b>Order</b>		<b>Reviewed on:</b> 8-13-14
<b>Aff. Posting</b>		<b>Updates:</b>
<b>Status Rpt</b>		<b>Recommendation:</b>
<b>UCCJEA</b>		<b>File 15 – Karlee</b>
<b>Citation</b>		
<b>FTB Notice</b>		

**Probate Status Hearing Re: (1) Failure to File Inventory and Appraisal; (2) Failure to File a First Account or Petition for Final Distribution**

<b>DOD: 1-12-89</b>	<b>MARY ELLEN RODRIGUEZ and DOLORES TRUJILLO</b> , Daughters, were appointed as Co-Administrators without IAEA and with bond of \$8,000.00 on 1-16-1990.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note: The personal representative was represented by attorney Jin Ishikawa, who is now deceased.</b>	
	Bond was filed and Letters issued on 1-17-1990.		
<b>Aff.Sub.Wit.</b>		<ol style="list-style-type: none"> <li><b>1. Need Inventory and Appraisal. Probate Code §8800.</b></li> <li><b>2. Need account or petition for final distribution. Probate Code §12200.</b></li> </ol>	
<b>Verified</b>			
<b>Inventory</b>	Nothing further was filed.		
<b>PTC</b>			
<b>Not.Cred.</b>	The open estate was discovered and the Court set this status hearing.		
<b>Notice of Hrg</b>	Notice of Status Hearing was sent to Dolores Trujillo on 7-2-14.		
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>	<u>Note:</u> The original petition for probate estimated the estate to contain personal property valued at \$7,000.00 and real property valued at \$55,000.00; however, no Inventory and Appraisal was ever filed pursuant to Probate Code §8800.		
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>	<u>Note:</u> The original petition indicated that the decedent had 10 adult children who would be heirs to this estate.		
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			<b>Reviewed by:</b> skc
<b>Order</b>			<b>Reviewed on:</b> 8-13-14
<b>Aff. Posting</b>		<b>Updates:</b>	
<b>Status Rpt</b>		<b>Recommendation:</b>	
<b>UCCJEA</b>		<b>File 16 – Rodriguez</b>	
<b>Citation</b>			
<b>FTB Notice</b>			

## Fourth Account and Report of Conservator and Petition for Its Settlement

<b>Age: 22 years</b>		<b>TIM COLLINS</b> , conservator, is petitioner.  Account period: 4/24/13 – 4/23/14  Accounting - <b>\$154,767.82</b> Beginning POH - <b>\$141,978.50</b> Ending POH - <b>\$131,459.99</b>  Current bond: \$61,000.00  Conservator - Allowed \$500.00 per month per court order dated 3/21/13.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Beginning property on hand is incorrect. In the last account there was a discrepancy of \$25.00 that the court ordered be corrected. An amended summary of account was filed on 8/5/13 showing the ending property on hand as \$142,003.50. Therefore the beginning property on hand should be \$142,003.50.  2. Disbursement schedule shows reimbursement of \$1,761.88 to the conservator to move the conservatee to his condo. Need itemization.  3. Receipts include the conservatee's wages totaling \$864.58. Probate Code §2601 states wages are not part of the conservatorship. Wages shall be paid to the conservatee and are subject to his or her control to the same extent as if a conservatorship did not exist.
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> W?		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		<b>Petitioner prays for an order:</b>  1. Settling and allowing the fourth account and report;  2. Approving and confirming the acts of the petitioner as Conservator of the person and estate of Michael Collins.	<b>Note:</b> If the petition is granted, status hearings will be set as follows:  <ul style="list-style-type: none"> <li><b>Wednesday, June 8, 2016</b> at 9:00 a.m. in Department 303, for the filing of the Fifth account.</li> </ul> Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<input checked="" type="checkbox"/>	<b>2620(c)</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<b>Aff. Posting</b>		<b>Reviewed by: KT</b>	
<b>Status Rpt</b>		<b>Reviewed on: 8/12/14</b>	
<b>UCCJEA</b>		<b>Updates:</b>	
<b>Citation</b>		<b>Recommendation:</b>	
<b>FTB Notice</b>		<b>File 17 – Collins</b>	

Atty Mejia, Monica L (Pro Per – Petitioner – Maternal Grandmother)

## Petition for Termination of Guardianship

<b>Age: 5</b>		<b>MONICA L. MEJIA</b> , Guardian/Maternal Grandmother, is Petitioner. Petitioner was appointed Guardian on 04/08/2013.  <b>Father: ERNEST FERNANDEZ</b>  <b>Mother: PRISCILLA MEJIA</b> <i>Consents and waives notice</i>  Paternal Grandfather: Not listed Paternal Grandmother: Not listed Maternal Grandfather: Not listed  <b>Petitioner states:</b> Mother is back in the home and will take care of the minor.  <b>Court Investigator Jennifer Young's report filed 05/30/2014.</b>  <b>Court Investigator Jennifer Young's supplemental report filed 07/23/2014.</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Minute Order of 06/05/2014:</b> No appearances. The court investigator is ordered to contact Sacramento County regarding the status of the investigation.  1. Need Notice of Hearing.  2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Termination Guardianship or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Ernest Fernandez (Father)</li> <li>• Paternal Grandfather (Not Listed)</li> <li>• Paternal Grandmother (Not Listed)</li> <li>• Maternal Grandmother (Not Listed)</li> </ul>
<b>Cont. from 060514</b>			
<b>Aff.Sub.Wit.</b>			
✓ <b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>	x		
<b>Aff.Mail</b>	x		
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
✓ <b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<b>Reviewed by:</b> LV <b>Reviewed on:</b> 08/12/2014 <b>Updates:</b> <b>Recommendation:</b> <b>File 18 - Fernandez</b>	

<b>Priscilla age: 9</b>	<b>DELIA MARIE GALINDO</b> , mother, is petitioner.  <b>NICOLE GONZALES</b> , paternal aunt, was appointed guardian on 9/3/13.  Father: <b>ANTHONY GONZALES</b>  Paternal grandfather: Daniel Gonzales Paternal grandmother: Cecelia Gonzales Maternal grandmother: Theresa Martinez  <b>Petitioner states</b> she was recently released from Fresno County Jail after serving her term on AB109. She states she is no longer on probation and does not have any open cases. She did not come to the hearing on 8/28/13 because she was in jail. Petitioner states while Anthony [father] had custody she has an ongoing relationship with the girls but was not living in the same house. Petitioner states she is now living in Firebaugh with her mother, who has guardianship of Petitioner's son, Xavier. Now that her life is on track Petitioner believes she can take responsibility and provide for her children.  <b>Declaration of Guardian Nicole Gonzales filed on 8/11/14</b> states she does not believe Delia is clean from using drugs and fears for the girls safety if visits are awarded.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need proof of service of the Notice of Hearing on: a. Anthony Gonzales (father)  2. Petition does not include a specific visitation request.	
<b>Mariah age: 4</b>			
<b>Cont. from 061214</b>			
<b>Aff.Sub.Wit.</b>			
✓ <b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
✓ <b>Notice of Hrg</b>			
<b>Aff.Mail</b>			X
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>	X		
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<b>Reviewed by: KT</b> <b>Reviewed on: 8/12/14</b> <b>Updates:</b> <b>Recommendation:</b> <b>File 19 - Gonzales</b>	

## Petition for Termination of Guardianship

Age: 8 months	ERIC M. RIVERA, father, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Notice of Hearing.  2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Termination of Guardianship or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>Wendy Okeogwale (Guardian)</li> <li>Monisha Nichole Okeogwale (Mother)</li> <li>Margaret Kathrin Gervacio (Paternal Grandmother)</li> </ul>
Cont. from		
Aff.Sub.Wit.	Mother: <b>MONISHA NICHOLE OKOEGWALE</b>	
✓ Verified		
Inventory	Paternal Grandfather: Ernest C. Rivera, Deceased	
PTC	Paternal Grandmother: Margaret Kathrin Gervacio	
Not.Cred.		
Notice of Hrg	x Maternal grandfather: Eddie Ode Okeogwale, Deceased	
Aff.Mail	x Maternal grandmother: Wanda Joyce Darnell, Deceased	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	<b>Petitioner states:</b> Minor's parent was not properly notified of this guardianship action and desires to terminate or establish a parenting plan that is in his daughter's best interest.	
Conf. Screen		
Letters		
Duties/Supp		
Objections	<b>Court Investigator Jennifer Daniel's report filed 08/07/2014.</b>	
Video Receipt		
✓ CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Reviewed by: LV
Reviewed on: 08/13/2014
Updates:
Recommendation:
File 20 – Okeogwale

Josiah Age: 2mos		<p align="center"><b><u>NO TEMPORARY REQUESTED</u></b></p> <p><b>EDDIE ALEGRIA</b>, cousin, is petitioner.</p> <p>Father of Josiah (per CI Report): <b>ADRIAN GAYTON</b></p> <p>Father of Neveah: <b>PABLO DOMINGUEZ, III</b>, Objection filed 08/08/2014</p> <p>Mother: <b>CHRISSEY QUAIR</b>, Declaration of Due Diligence filed 06/09/2014</p> <p>Paternal Grandfather of Josiah: Not Listed Paternal Grandfather of Nevaeh: Not Listed</p> <p>Paternal Grandmother: Maylou Dick (Listed for each child)</p> <p>Maternal Grandfather: Not Listed Maternal Grandmother: Not Listed</p> <p><b>Petitioner states:</b> Neveah has been with the petitioner for 12 months and Josiah was tested positive for meth when he was born, CPS was involved and the children were given to the petitioner by the mother.</p> <p><b>Objection filed by Pablo Dominguez, father of Nevaeh, on 08/08/2014</b> states he feels that his daughter should reside with him. He was not informed that the child's mother left the child with strangers. He states he can provide a stable home, love, time and affection. He states he was not given the opportunity to be in his daughter's life, but now he can. He also states that the petitioner is not a relative to him, his family, or the mother.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Adrian Gayton (Father of Josiah)</li> </ul> </li> </ol> <p><b>Note:</b> Pursuant to the CI Report, the father, Adrian Gayton, is currently incarcerated in the Kings County Jail.</p> <ul style="list-style-type: none"> <li>• Pablo Dominguez, III (Father of Nevaeh)</li> <li>• Chrissy Quair (Mother)- Unless the Court dispenses with notice.</li> </ul> <p><b>Note:</b> Declaration of Due Diligence is incomplete. It does not provide any information regarding petitioner's last contact nor the results of her search for the mother.</p> <p align="center"><b><u>Please see additional page</u></b></p>	
Neveah Age: 1 yr				
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
✓	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			x
<input type="checkbox"/>	Aff.Mail			x
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			x
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
✓	CI Report			
<input type="checkbox"/>	9202			
✓	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
✓	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 08/13/2014</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 21 – Gayten &amp; Dominguez</b></p>		



Court Investigator Samantha D. Henson's report filed 08/06/2014.

**NEEDS/PROBLEMS/COMMENTS continued:**

3. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
  - **Paternal Grandfather of Josiah (Not Listed)**
  - **Paternal Grandmother of Nevaeh (Not Listed)**
  - **Maylou Dick (Paternal Grandmother)**
  - **Maternal Grandfather (Not Listed)**
  - **Maternal Grandmother (Not Listed)**

Petition to Determine Succession to Real Property (Prob. C. 13151)

Age:		NEEDS/PROBLEMS/COMMENTS:  <b><u>OFF CALENDAR</u></b>  Scheduled in error
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA	Reviewed by: skc	
Citation	Reviewed on: 8-13-14	
FTB Notice	Updates:	
	Recommendation:	
	File 22 – Leek	

## Petition for Appointment of Temporary Conservatorship of the Person and Estate

		<b>TEMP GRANTED EX PARTE EXPIRES 8-14-14</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>GENERAL HEARING 9-10-14</b>	<b>Court Investigator advised rights on 8-5-14</b>
		<b>PUBLIC GUARDIAN</b> is Petitioner and requests appointment as Temporary Conservator of the Person and Estate. Petitioner also requests authority to change the proposed conservatee's residence during the temporary conservatorship.	1. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) on the proposed conservatee.
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>	X	
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input checked="" type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<b>Estimated Value of Estate:</b> Personal property: \$9,539.23 Annual income: \$9,180.00	
		<b>Petitioner states</b> the proposed Conservatee cannot cook for herself and has grown frail. She recently fell three times in one week. She cannot continue to live in her apartment without a caretaker, which she cannot afford. She is also becoming paranoid, and does not want to be left alone.	
		<b>Public Guardian filed a Probate Conservatorship Investigation Report on 8-1-14.</b>	
		<b>Court Investigator Julie Negrete filed a report on 8-7-14.</b>	
			<b>Reviewed by:</b> skc
			<b>Reviewed on:</b> 8-13-14
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 23 – Manitto</b>